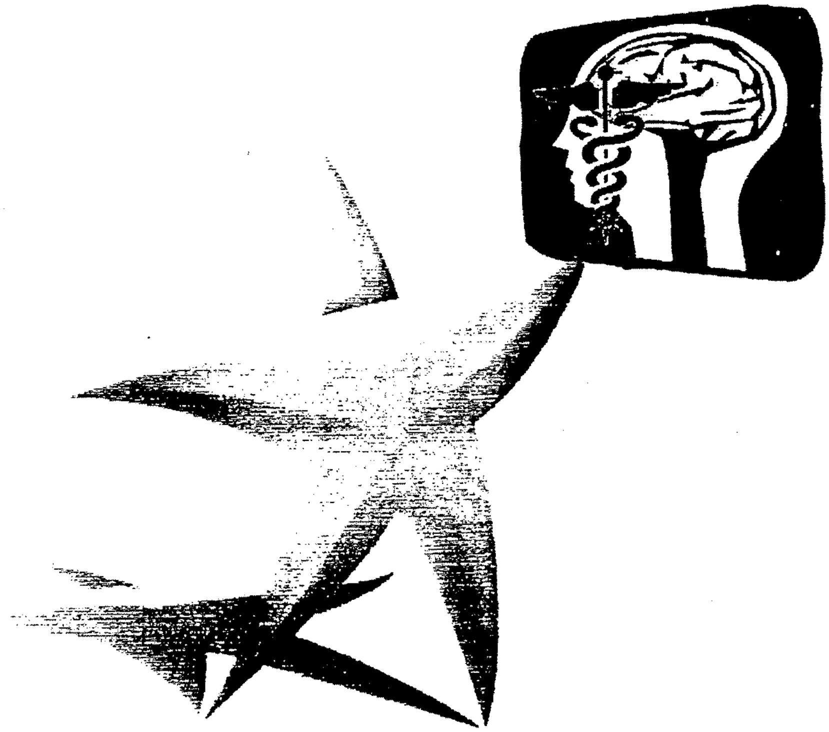
Join the Club

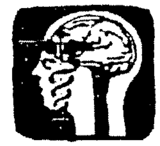


Participant Self-Study Workbook

Office Based Representative
Product & Disease Knowledge
Milestone 1

Ver. 03/01

JOIN THE CLUB



Learning Objectives

As a result of successfully completing this module, you will be able to:

- Confidently and effectively plan and facilitate an Approved Reprint Review Session with peer professional representatives.
- Identify through Order As Needed (OAN) the approved professional journals that you can regularly review.
- Analyze reprints approved by Merck for use in promotion, and use the information in sales discussions.
- Identify key ingredients for successful facilitation of Approved Reprint Review Sessions with peer professional representatives.
- List objectives for Reprint Reviews based on lead products.

"ROE": Return on Experience

The bottom line of this self-directed learning activity is for you to learn how to confidently and effectively facilitate a reprint review session with other professional representatives of Merck, using approved reprints. Along the way, you'll improve your:

- Understanding of the studies and the core promotional messages they support.
- Understanding of how to dissect appropriate approved journal articles for review.
- Ability to apply content from the reprints into your sales discussions.
- Understanding of the targeted disease states for Merck's products and, therefore, effectively respond to customer questions and obstacles with approved promotional messages.

Both your credibility and value to customers will be strengthened as a result.

Note: Value is defined as something intrinsically important that guides or motivates an individual. It does NOT refer to anything of monetary value which is in violation of Merck policy.

Compliance Instruction

You are reminded that all of your activities must comply with <u>all</u> applicable Policy Letters and Corporate Policies. Although many such policies apply to your activities in this training course, Policy Letter 110 is of particular relevance.

You are further reminded that anyone who violates any Policy Letter is subject to immediate disciplinary action up to and including termination.

Module Requirements

To successfully meet course requirements, complete the following required sections in the program.

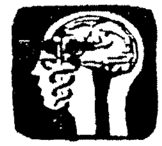
- ❑ Summary of a Selected Approved Reprint (page 7)
- ❑ Organizing and Facilitating a Reprint Review Session With Peers (page 12)
- ❑ Applying Approved Article Information on Territory (page 13)
- ❑ Summary Feedback Form from a "Rep Club" (page 18)

Topics Covered in this Module

1. The Role of Approved Reprints in Promotion
2. Analyzing an Approved Reprint
3. Planning a Review Session
4. Facilitating a Review Session
5. The Approved Reprint as a Selling Resource

Self-Study Instructions

- Read the background information.
- Complete the exercises woven throughout the self-study program.
- Summarize an approved reprint in preparation for a reprint review session and submit this summary to your Business Manager for review.
- Organize and facilitate a "Rep Club" or Reprint Review Session with colleagues.
- Summarize peer feedback from the Review Session, and submit it to your Business Manager for review.
- Prepare a one half page summary on how to use reprint information on territory.
- Throughout this workbook, you'll find Tips to help you work through the exercises.
- Upon completion of this course, please access the following form, via Merck Forms: "PDS Course Completion Form." After obtaining your Business Manager's approval that you have successfully completed this course, fill out the form, click the submit button, and the form will be transferred to a data management system upon your next successful Merck Connect Session. *This must be completed in order for you to obtain Milestone credit for taking this course.*



Resources Available to Assist You

The following resources are needed to complete this course.

1. This Workbook: Contains exercises to learn about programs involving approved reprints in a "reprint review session" format and helpful tips on planning and facilitating your own "reprint review session."
2. OAN: Contains approved reprints for each product, as well as a handy booklet entitled, "How to Read a Medical Research Article."

Background Information

They say, "Knowledge is power." In our business, knowledge -- both in your hands and in the hands of our customers – is "the power of competitive advantage." This module is about leveraging the knowledge gained from approved journal articles so that you will be better equipped to:

- Apply a more in-depth understanding of the disease states to which our products are targeted on territory,
- Effectively respond to customer questions and obstacles, and
- Build productive relationships with customers by enhancing your credibility and value.

  Note: Value is defined as something intrinsically important that guides or motivates an individual. It does NOT refer to anything of monetary value which is in violation of Merck policy.

You've undoubtedly heard of, or maybe even been a member of, a book discussion or investment club in which a small number of people with similar interests share their insights and experiences for mutual gain and enjoyment.

Similarly, the review session with approved reprints, whether internal, or as a Educational Program Integration (EPI) program, will hereafter be referred to as "the Club." These sessions can be an effective way for you and your colleagues to efficiently review and discuss approved reprints to support the products you promote.

1. The Role of Approved Reprints in Promotion

As a Professional Representative, it is critical that you are familiar with approved reprints for the products you promote. Equally important are background articles provided by Merck summarizing articles that concern disease states your products treat and/or alleviate.

Please note the definition of the following terms used throughout this workbook.

- An "approved reprint" describes those articles that have been approved by West Point for your use in promotional activities.
- "Background articles" are those that have been approved by West Point for background use only.

Approved reprints provide solid evidence as to why your customers should prescribe Merck products for appropriate patients. When the bulletin accompanying approved reprints gives permission to do so, approved reprints may also be used to correct misconceptions customers have about the benefits of competing products and to counter false claims competitors make about Merck products.

When your customer asks, "What do you think about that study in the latest issue of the New England Journal of Medicine?" you don't want to damage your credibility by having to admit, "I haven't had a chance to read that yet!" **While you cannot discuss the study unless and until it is approved for promotion, you can stay informed.** You may acknowledge that you have reviewed the article, but you are not permitted to discuss it. If the customer has a specific question relating to an unapproved article, you may offer to submit a Professional Information Request in compliance with Policy Letter 104.

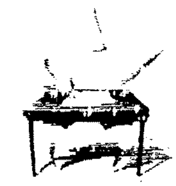
There are two types of articles:

1. **Approved Reprints** -- Reprints that are approved for use with customers in promotional discussions. They may be requested from "Order As Needed (OAN)."
2. **Background Articles** -- Articles that are not approved for promotion but for background information only. These articles may contain valuable background information, but this information cannot be used, and the articles cannot be referenced, during sales discussions with your customers.

REMEMBER: Non-approved reprints and journals cannot be discussed in a sales discussion, as this is a clear violation of Company policy.

Aside from your own or colleagues' subscriptions, hospital and medical school libraries are, of course, repositories for these journals. In a hospital, you may need to obtain visiting privileges from the institution's pharmacy department, purchasing department, or your hospital representative. Check with your hospital representative regarding the hospital's policies. You can then browse current and back issues. Remember also, when accessing on-line libraries you need to comply with applicable Company policies, including Policy Letter #142.

2. Analyzing an Approved Reprint



Behind the PDS toolkit tab for Product and Disease or through OAN, you will find reference to a handy booklet entitled "How to Read a Medical Research Article." You may want to review this booklet for a refresher on Study Design, Data Issues, Statistical Concepts, Specialized Types of Analyses, Reading Tables and Graphs, and the identification of different sections of an article. You can also find the booklet at: http://fsnet.merck.com/. Click on Departments, then on Medical Services - Educational Materials, then look for General Information. Under General Information, it will say "How to Read a Medical Research Article." Click on this, and it will take you to the document.

The Bulletin Management System contains bulletins, some of which outline approved articles that may be used in sales discussions. These bulletins outline an approved article's key points and the current promotional messages. You can find these bulletins at: http://fsnet.merck.com/. Click on Bulletins on the compass, then on USHH Bulletin Archive. Select your point product category to access a list of recent bulletins associated with that category/product.

As an example of a summarization of a journal article, read a recent bulletin that outlines an approved article's key points for your point product. This example provides a good template for what to look for and how to identify the key points that you, colleagues, and customers will care about.

Question

- Why is it important to identify the investigators and their affiliation?

See the end of the module for the answer.

Assignment – Summary of a Selected Approved Reprint

Obtain an approved reprint for one of your products from OAN. To access, follow these steps.

- Double click on the OAN icon on your desktop
- Find the "Product Family Listing" box on the right side of the OAN screen
- Select a product
- All available resources for that product will appear in the box on the left side of the OAN screen (resources are listed by item number, category, and item description)

Prepare a one- or two-page summary of the article using either:

1. The format in the bulletin you read for the previous page, or
2. The S.O.A.P. format, if you've already completed the Milestone courses, *Selling with Reprints.*

The answers to the following questions may not be included in the bulletin that you read and the S.O.A.P. format may not directly address this, however these answers must be included in your summary.

- What does this study mean to the product at issue?
- How can we leverage this study in our promotion for this product?
- How does this study's findings tie into my promotional messages or tactics?

Submit and review this summary with your Business Manager.

3. Planning a Review Session

Now that you have a good understanding of how to review journal articles, let's look at the value of Review Sessions, or "Clubs," and how you can put them into effect.

There are two types of Review Sessions.

1. Representative Clubs: You arrange for clustermates or other professional representatives from Merck to get together to review articles. Often, this is sponsored by a specialty representative who invites office-based representatives to attend. The primary goal is to spread knowledge in an efficient and in-depth way.
2. Educational Program Integration (EPI): You arrange for several customers to get together, often with some fellow representatives attending, to discuss approved articles. This meeting must take place in the HCP office or a hospital setting. EPI are designed to enable a representative to conduct an extended product discussion, consistent with approved labeling, with targeted physicians and/or health care providers. The goals include:

- Building relationships with the physicians,
- Obtaining information about what's new in their field and practice, and
- Learning what customers care about and their thinking on Merck products.

NOTE: These EPI programs must be conducted in full compliance with all Policy Letters.

TIPS:

- Limit a session to six to seven participants so that everyone can get involved, yet focus can be maintained.
- Invite your business manager.
- Include all healthcare professionals when discussing the article.

Where and when to hold the Club will depend on the schedules of those you are inviting.

- A Rep Club may be held during a cluster meeting or in conjunction with a district meeting.
- EPI Programs may be held at various times of day, depending on what is most convenient for your audience.

Checklist Job Aid

- ❑ Identify participants
- ❑ Identify approved article(s)
- ❑ Choose an appropriate site, date, and time
- ❑ Send out invitations
- ❑ Confirm meeting with participants and hand out copies of the article to review in advance
- ❑ Prepare your own article analysis
- ❑ Prepare a brief agenda to provide focus (if more than one article is being reviewed)
- ❑ Prepare prompting questions

TIPS:

Make sure the meeting space is adequately prepared, i.e., comfortable seating, privacy, and appropriate logistics. If a modest meal will be provided, pre-notify staff that you will be the person accepting the bill; bring extra copies of the articles and pads/pens; and make sure that refreshments are available.

4. Facilitating a Review Session

Because you are sponsoring the meeting, you should serve as facilitator in order to ensure:

- Goals are met.
- Participation is balanced.
- An informal and friendly, yet focused and professional, climate is maintained.
- Time constraints are met.
- Any discussion with healthcare professionals is consistent with product labeling., is appropriately balanced, and that product circulars are offered for each product discussed.

When calling the meeting to order, you may wish to do the following:

- Clarify and gain agreement on meeting objectives.
- Review and gain agreement on the agenda and timing.
- Identify the level of participant preparation.
- Discuss the form for conducting the meeting.

  For example, one option is for one person to present first and then allow other participants ask questions. Another option is for one person to present first and then ask the other reviewers present to share anything that they noticed that is different or not covered by the prior presenter. Everyone takes notes and holds questions until the end of presentations at which time discussion can begin.
- Kick things off by asking someone to relate observations about the first article.

The Strategic Use of Questions

During the meeting, use prompting questions to involve non-participating members in the meeting or to open the floor to all members when a particular speaker is dominating the discussion. Some examples of prompting questions include:

- "That's interesting, what do others think about that?"
- "Let's hear from some other people; what are some different interpretations?"

You will also find it effective to use questions to probe deeper to obtain insights from speakers. Some examples include:

For Rep Review Sessions only

- "How could we use this information on territory?"
- "What parts of the reprint would interest physicians in our territory?"
- "How could this study or reprint impact our business - negatively or positively?"
- "How can this competitor's study adversely effect our business?"
- "Where is the appropriate "fair balance" in the study?"

For HEL Programs

Warning: Non-approved reprints cannot be used.

- "How many patients in your practice are similar to those outlined in the study?"
- "How do you usually treat these patients?"
- "How are the conclusions of this study similar to the results you've seen in your practice?"
- "What part of this study interests you the most?"

Question

- What do you notice that all these questions have in common?

See the end of the module for the answer.

Wrap up the meeting by

- Requesting feedback from participants about the value of the session,
- Requesting any suggestions for improvements.
- Asking whether they would be interested in reconvening at a later date (the Club may wish to establish a standing schedule, such as once a month); and
- Thanking everyone for his/her participation.

Take the First Step

Take the first step by listing below the names of those you would invite to your first Club.

Assignment: Organizing and Facilitating a Reprint Review Session with Peers

Sometime over the next three months, arrange to hold a Rep Club or Reprint Review session with your colleagues. Using an approved article that you've analyzed, facilitate a session focusing on:

- Analysis of the reprint, using the S.O.A.P. format, if appropriate.
- Application of the reprint content to specific sales discussions and physician types.

At the completion of the session, ask participants to discuss what was valuable and effective about the meeting and what should be changed for future review meetings. Ask each participant to provide written feedback. This will give you information about what you did that made the session particularly effective, as well as what you may need to do differently in the future. Upon completion of the course and after reviewing the feedback, summarize the key information on one sheet and include it with your submission to your manager. (Note: A Peer Feedback Form and Summary Feedback Form are provided at end of this workbook.)

5. The Approved Reprint as a Selling Resource

Of course, you are interested in learning how you can use the information you gain in a Club to support your sales message. The following assignment will give you an opportunity to think this through.

Assignment: Applying Approved Article Information on Territory

For the summary (Bulletin) that you read in the earlier assignment, write a one half page description of how the information from this article may be used on territory to promote your product(s) and overcome obstacles. Questions to help guide you through this process are provided on the following pages. Remember that your use of approved articles in promotional discussions must be balanced and consistent with the product circular, and must conform to instructions provided by West Point in the bulletin accompanying the reprint.

Applying Approved Article Information on Territory

1. Which core approved promotional messages are supported by this study?

2. What specific sections support those messages and how?

3. How does this study show the potential value of Merck products for appropriate patients?

4. With what type of physician would this clinical research study be most effective and why?

5. What physician treatment objectives can be addressed using this report?

6. Which physician obstacles may be handled with this study?

7. What potential concerns might a physician raise regarding this study, and how can they be addressed?

8. How can this clinical research study be used to position your product versus a competitor?

9. What are the key points of balance that should be included in a discussion of this study to ensure a full and fair presentation to the customer?

10. How can I deliver the messages I have identified as important while ensuring consistency with the instructions from Merck, including any required disclaimers about content in the study that is not wholly consistent with labeling?

Peer Feedback Form for Representative Club

- Feedback given to:
- Feedback given by:
- Date of Review Session:
- Article Reviewed:
  - What was the value of this session to you?
  - What do you think of the choice of articles for review?
  - How appropriate was the time spent on reviewing each of the articles?
  - What do you think of the meeting sponsor's balance of moving the agenda forward (task and time sensitivity) while allowing for depth and breadth of discussion?
  - How effective was the choice of location and time?

- How adequate was the sponsor's preparation, including provision of an advance agenda?

- Did the sponsor ensure that the process to be used for the session was clear and agreed upon?

- How well did the sponsor manage the discussion and involvement by participants?

- How would you describe the sponsor's ability to facilitate depth of review and discussion?

- Other Comments:

Assignment: Summary Feedback on Representative Club

- Feedback given to:
- Feedback given by:
- Date of Review Session:
- Article Reviewed:
- Sponsoring Professional Representative's Overall Comments:
- Summary of Feedback from Peers about what I did that was particularly effective:
- Summary of Feedback from Peers about what I did that could be improved:
- What I will do differently next time:
- Key learnings about facilitating a review session:

Q & A: Answer Key

Question (page 6)

Why is it important to identify the investigators and their affiliation?

Answer

Identifying the investigators and their affiliation establishes the credibility of the study in the eyes of the customer. A study that shows Merck products in a positive light. conducted by highly credible sources, or alternatively, a competitor-supporting study conducted by less credible sources can promote Merck products versus the competition. Remember, only approved articles provided by Merck can be used in promotion.

Question (page 11)

What do you notice that all these questions have in common?

Answer

They are all open-ended questions, which typically begin with such words as "What," "Why," "How," "Describe," or "Tell me about." These encourage respondents to provide more information than closed-ended questions. Closed-ended questions typically begin with a verb such as "Does," "Is," "Could," or "Would," and lead to "Yes" or "No" or short answer responses which are less revealing.

Diversity: Business Case Applications

Uniquely Designed For

MERCK Merck & Co., Inc.
Office-Based Sales

Presented by

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Diversity: Business Case Applications
Office-Based Sales

Diversity: Business Case Applications

"The critical work life skill of the 21st Century will be recognizing, resolving, and managing conflict where diversity is involved."

William A. Guillory, Ph.D.

Objectives

The objectives of this module are to:

1. Apply the skills learned in "Diversity – The Competitive Advantage" to "real" work-life situations.
2. Learn to transform problem, conflict, or crisis situations into a work life and/or business opportunity.
3. Learn a technique for problem solving or crisis resolution.

Diversity: Business Case Applications

Instructions:

1. Read the case studies.
2. Use the sequence of questions associated with each case study in order to practice using the "diversity learning skills" for conflict, problem, or crisis resolution.
3. Identify the *underlying source* of the conflict, problem, or crisis in each situation and then develop strategies, identify skills, and recommend procedural changes for a successful outcome.

Case Study A – "Reach Out and Touch, Somebody's Hand..."

Tony, a tenured representative organizes an HEL program. He asks his cluster mates to help recruit as well. All the representatives help in marketing the program, including the newest representative, Susan, who just started in the field. Tony experiences difficulty in understanding and relating to Susan. During the program, Tony completely disregards Susan. He does not introduce her to the local physicians or acknowledge her in any way. Susan feels isolated and unappreciated. She wonders if this is a reflection on her abilities and immediately starts out her first days in the field somewhat disenchanted. After the first month, she begins making plans to leave.

1) Why does Susan feel isolated and unappreciated?

2) What are the probable experiences Tony has in terms of working with Susan?

3) What is the probable source of their disconnect?

Definition of Leveraging Diversity

Diversity is an environment wherein differences are valued and integrated into every part of an organization's operation.

Valued means that differences are equally valid. This mind-set has the potential for higher-level creativity, innovation, and performance.

Integrated means that the various differences represented in an organization are incorporated in the way the organization does its day-to-day business.

The Dimensions of Diversity

These are classified according to the following descriptions:

Human Diversity	Cultural Diversity	Systems Diversity
Characterized by physical differences, personal preferences, or life experiences	*Characterized by beliefs, values, and personal characteristics*	*Characterized by the organizational structure and management systems*
• Race • Sex • Differently-Abled • Marital/Family Status • Sexual Orientation • Ethnicity • Age • Military Experience	• Language • Learning Style • Gender • Historical Differences • Cross-Cultural Relationship/ Communication • Religion • Workstyle • Classism/Elitism • Ethics/Values • Lifestyle • Family-Friendly Practices	• Teamwork • Innovation • Reengineering • Strategic Alliances • Empowerment • Quality • Education • Corporate Acquisitions

Diversity Learning Skills for Conflict Resolution

State of Mind

A person's *attitude* is determined by what he or she *believes*, which in turn creates his or her *mind-set*.

A person's mind-set determines his or her *behavior*.

To understand your mind-set, examine the *results* you produce.

Mind-set / Attitude / Beliefs → Behavior → Results

Steps for Resolving Conflicts Where Diversity Issues are Involved

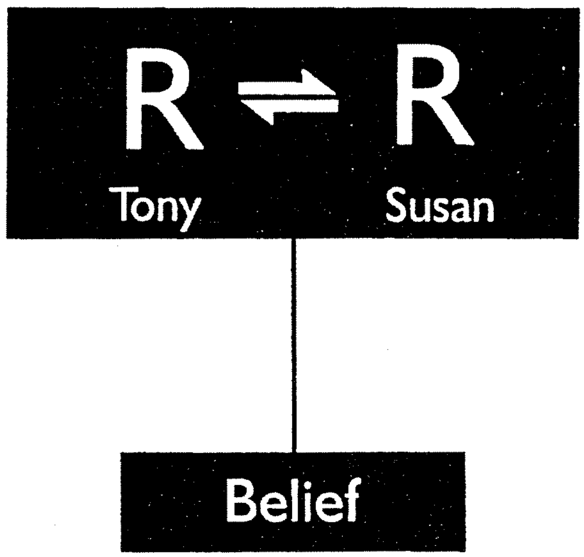
Listed below are the steps for resolving counterproductive beliefs and attitudes in managing and working in a diverse work force:

1. Discover and acknowledge counterproductive beliefs and attitudes.
2. Assume greater responsibility for devising solutions that exceed your comfort zone.
3. Formulate and implement personally appropriate and sufficiently challenging "direct actions strategies".

Self-Mastery

Self-mastery begins with awareness and acknowledgment of our own self-limitations played out through interpersonal relationships and communication.

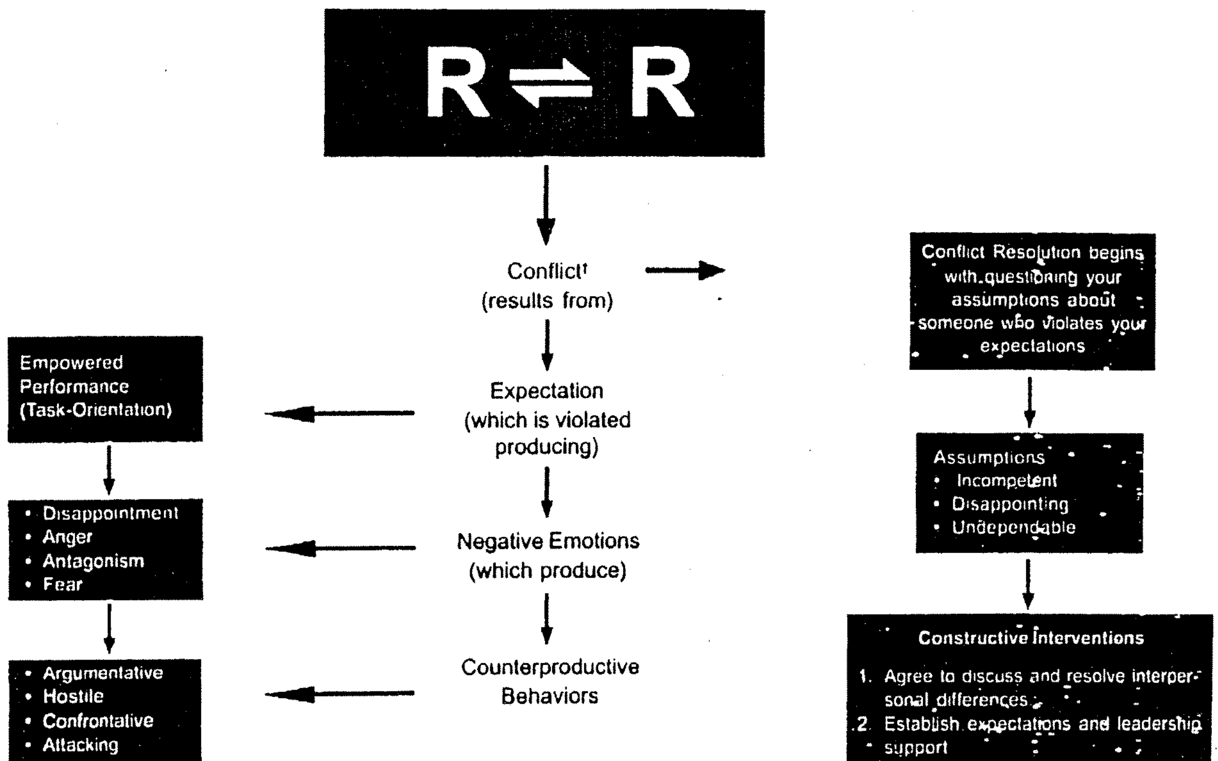
Dynamic Relationship Model



Where R represents both individuals in a dynamic relationship and Belief represents a complementary subliminal belief that is the underlying source of a conflict.

A Model for Resolving Interpersonal Conflict

Dynamic Relationship Model



[†]Conflict resolution begins with stopping the chain reaction before it starts

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Resolving Issues of Diversity

1. If interpersonal conflict occurs in the process of managing or working with someone, attempt to identify the issue(s) that may be the source of the difficulty.

   Behaviors:

   i) Have a constructive discussion with the person involved to identify the issue(s) of conflict you may have in common.

   ii) Identify those issues that fall into the category of general management and those involving diversity.

   iii) Consult your list of "sensitive beliefs and attitudes" that you identified from the diversity exercise or those identified by your co-workers for establishing priorities.

2. Begin the discussion by expressing any discomfort or fear you may both have about exploring such a sensitive area.

   Behaviors:

   i) Make an agreement (written, if necessary) of confidentiality regarding the open discussion of possible diversity issues.

   ii) Focus your discussions on how you experience each other when conflict occurs and what you both feel is (are) the issue(s) involved.

   iii) Without the necessity of a formal (or informal) agreement about the issue(s), agree on mutual behavioral changes as if the issue(s) identified has (have) validity.

Resolving Issues of Diversity Continued

3. Discuss and agree on the performance measures necessary to meet the organization's business objectives.

   Behaviors:

   i) Mutually agree on and document the performance measures necessary (for the individuals involved) to achieve outstanding performance—irrespective of cultural workstyles.

   ii) Mutually agree on and document the leadership or mutual support practices that will be instituted to maximize the probability of success.

   iii) Establish *measurable* milestones as a reality check for achieving outstanding performance.

4. Where appropriate or there is an opportunity, establish a short-term mentoring/coaching relationship.

   Behaviors:

   i) Meet weekly to discuss how the conflict issues are being resolved through awareness, sensitivity, and behavior.

   ii) Meet weekly to discuss whether the performance measures are being accomplished—provide substantive feedback to each other.

Resolving Issues of Diversity Continued

5. Create a personal growth program designed to gain mastery of your most sensitive diversity issues.

Behaviors:

i) Acknowledge, to yourself, that you do have unresolved diversity issues identified in #1 above.

ii) Use workplace projects to partner with individuals who are examples of such issues—where the performance objective is *more important* than the issue.

iii) Use these experiences to become aware of the assumptions you might have about individuals who are examples of these issues.

iv) Seriously examine your assumptions with the intention of realizing that they have no validity as a result of your experience of the individuals you partner with.

v) Continue to seek out experiences that break your pattern of experiencing similarities or homogeneity.

The Foundation of Empowerment

The foundation upon which empowerment is based involves a clear experiential understanding, acceptance, and skillful implementation of the following three definitions:

- Personal responsibility

  The willingness to view yourself as the *principal source* of the results and circumstances which occur in your life, both individually and collectively with others in the workplace.

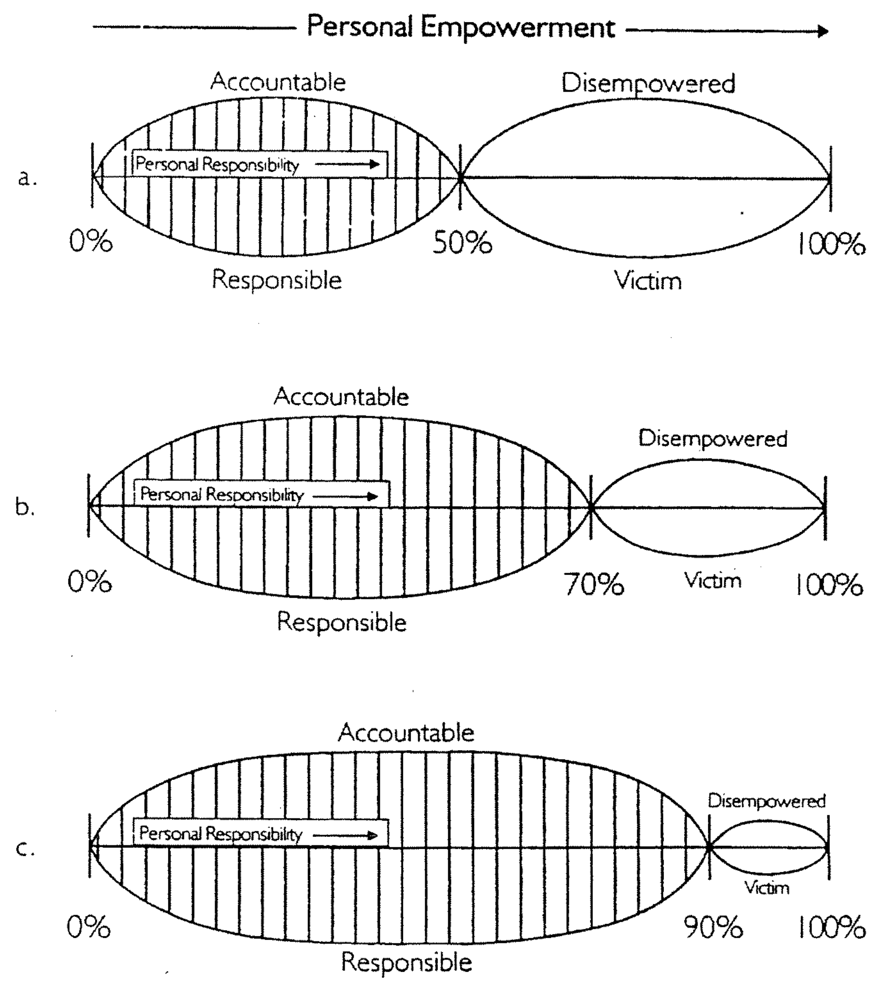
- Personal accountability

  The willingness to claim *ownership* for the results which are produced as a consequence of your involvement, both individually and collectively with others in the workplace.

- Personal empowerment

  An *internally derived* capacity to perform at or above an established level of expectation. This capacity is expanded by going beyond both self-imposed and external limitations.

The Responsibility Scale



Case Study A – Analysis of the Problem

Group Discussion

1) What expectation(s) did the new representative have? Were any of these violated? How?

   Expectation(s) – new representative, Susan

   - *coached and mentored*
   - *made to feel included*
   - *given a specific role in the program*

2) What expectation(s) did the tenured representative have? Were any of these violated? How?

   Expectation(s) – tenured representative, Tony

   - *you learn by observation*
   - *ask questions if you don't know something*
   - *don't speak out if you don't know what you are talking about*
   - *take the initiative to become part of the group*

3) What are the dynamic relationship behaviors from violated expectations? What is the probable underlying source of the problem (complementary belief)?

R	⇌ R
Tony	**Susan**
• don't give any role • tolerate – almost ignore • wait for new rep to take some initiative • conclude the new rep doesn't fit	• withdraw • isolate one's self • engage in self-talk • eventually leave – I don't fit!

He/I don't fit; this is an exclusive club

4) Who has the responsibility for resolving this situation?

Both - Preferably the tenured representative, Tony.

5) What steps can each responsible party take to resolve the situation?

Tenured Representative, Tony:

- *Recognize the necessity for inclusion of someone who is new*
- *Establish a coaching or mentoring relationship to create a "sense of inclusion" as well as professional learning for the new representative.*
- *Don't make any assumptions about what someone else is thinking or feeling; it is almost always inaccurate!*

New Representative, Susan:

- *Realize that success means taking responsibility for the situation you find yourself in - you are not being victimized by anyone.*
- *Be proactive in soliciting, mentoring, and coaching to create inclusion and professional learning.*
- *Take the initiative to learn as much as possible without the necessity of a coach or mentor.*

6) What would be a positive outcome and how can this situation be leveraged as a diversity opportunity?

- Agreement to constructively discuss and resolve their interpersonal (or generational) differences.
- Establish a short-term mentor/protégé relationship.

Diversity Opportunity:

New ideas and perspectives of the new representative, Susan, integrated with the experience and contacts of the tenured representative, Tony.

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Studies in Diversity – "Reach Out and Touch, Somebody's Hand..."

Problem:

Strategies:

Skills Needed:

Recommended Procedural Changes:

Case Study I – "We Are Familee..."

Alfonso, a young Gen X male, works in a Group A cluster with his counterparts Gary and Linda. Alfonso is single, while his two counterparts are each married with young children. Gary and Linda each have regular family responsibilities as well as emergency situations that commonly occur. The team members all seem to get along, but each prefers to work somewhat independently. The team frequently communicates concerning cluster activities and scheduled HEL events. Typically, the representative responsible for planning and conducting an HEL program notifies the cluster about the program four weeks prior to the event so that they can all plan to attend. Alfonso has attended all 10 planned evening HEL activities thus far this year, four of which he was personally responsible for planning and implementing. Gary and Linda each attended their own programs, but each only attended one of Alfonso's programs, claiming last minute personal excuses the day of or day before the program. Alfonso is frustrated at his two counterpart's commitment to the team and requests to be transferred to a more committed cluster or to be teamed with people "who have their lives together".

Discussion Questions:

1) What probable expectations did Alfonso have? Were any of these violated? How?

2) What probable assumptions did his counterparts have? Did these conform to Alfonso's probable expectations?

3) What probable assumptions and behaviors occurred between Alfonso and his counterparts when expectations were violated? What is the underlying source of the problem (belief)?

4) Who is responsible for resolving this situation?

5) What steps can each responsible party take to resolve the situation?

6) What issue of diversity is involved in this case study? What would be a positive outcome and how can this situation be leveraged as a diversity opportunity?

Studies in Diversity – "We Are Familee"

Problem:

Strategies:

Skills Needed:

Recommended Procedural Changes:

Case Study 2 – "I Can Make It On My Own..."

Randy, a Group A representative, appeals to his Group B counterparts during a cluster meeting to assist him in the promotional efforts of VIOXX® during the lead representative's three-month childcare leave. He asks that they give a brief verbatim to remind physicians about dosing, price, and efficacy during regular calls with 30 targeted physicians. At the cluster meeting, he suggests that the Group A representatives return the favor when their counterpart returns to her territory from childcare leave. His Group B counterparts agree to assist. At the next cluster meeting, when asked to estimate the number of VIOXX® details Group B representatives were able to deliver, each representative had an excuse for having delivered less than five physician details, citing the increased attention needed for their own products. Randy becomes upset and vows to never depend upon their assistance again.

Discussion Questions

1. What expectations did Randy have of his Group B counterparts?

2. Was the agreement specific, definable, and measurable in terms of *who, what,* and *when* so that accountability could focus on meeting Randy's expectations?

3. What assumptions did Randy probably develop about his Group B counterparts? What probable behaviors occurred as a result of these assumptions?

4. What might be the underlying source of Randy being upset?

5. What should have occurred when the Group B representatives realized they could not meet the previously agreed-upon expectations?

6. What issue of diversity is involved in this case study? What would be a positive outcome or how can this situation be leveraged as a diversity opportunity?

Studies in Diversity – "I Can Make It On My Own..."

Problem:

Strategies:

Skills Needed:

Recommended Procedural Changes:

Case Study 3 – "I'll Get By As Long As I Have You..."

Sheila, a competitive business manager, is quick to get ahead. She shows preferential treatment towards Annette, a successful representative who threatens to leave unless compensated accordingly. Sheila's favoritism towards Annette is also apparent during meetings and conference calls. Sheila gives stock options, large merit increases, and other rewards to Annette based upon her performance. Annette is single and does not have a family so she is able to give 100% to Merck and sometimes more. Although, the other members in the cluster work just as hard (if not harder because they have families), they feel they are not compensated or recognized for their performance and they are unwilling to compete with Annette for being the "manager's favorite". Annette's cluster mates are frustrated by the perception that favoritism is being shown towards her. Morale is very poor and the cluster members are very unhappy with the lack of "team playing". As a result of the antagonism toward her, Annette has begun interviewing at another competitor company.

Discussion Questions

1. Who is responsible for the poor morale and lack of "team playing"? Who has *direct* responsibility for addressing these issues?

2. What are Sheila's probable expectation(s) of the team? Are these expectations understood by all?

3. What possible assumptions does Sheila have of the team that are not necessarily required for successful performance?

4. What possible assumptions and behaviors have the team members developed about Sheila? What might be the underlying issue(s) team members with families are reacting to?

5. Do you believe the team members' assumptions are valid? Why?

6. What steps can each responsible party take to resolve the situation?

7. What issue of diversity is involved in this case study? What would be a positive outcome and how can this situation be leveraged as a diversity opportunity?

Studies in Diversity – "I'll Get By As Long As I Have You..."

Problem:

Strategies:

Skills Needed:

Recommended Procedural Changes:

Case Study 4 – "R-E-S-P-E-C-T..."

A large HEL program was recently conducted in an area that is typically very difficult to get physicians to attend evening programs. Following the speaker presentation, several physicians were mingling while enjoying after dinner cocktails. Dr. Hines, a white physician and one of the highest rated prescribers in the geography. consumed an excessive amount of alcohol. He commented to Dr. Su, an Asian female, that she was lucky to be in America and that Asian women love American men. The cluster had discussed the possibility of not inviting Dr. Hines because of past behavior. One of the representatives invited him anyway because he was such a high prescriber. In addition, he had gotten a promise from Dr. Hines that he would not drink too much and "be on his best behavior". Dr. Su was quite embarrassed and reported the incident to a cluster member.

Discussion Questions

1. Who are the responsible parties for an incident involving Dr. Hines and Dr. Su?

2. Was the representative's decision to invite Dr. Hines justified, *before the incident*, if he had gotten a promise from Dr. Hines of "good behavior"?

3. What should the cluster do on behalf of Dr. Su, for the incident and for future HEL events?

4. What should the cluster do on behalf of Dr. Hines, for the incident and future professional service?

5. What should the cluster do if Dr. Hines insists on attending future HEL events as a condition for prescribing the cluster's products?

6. What is the underlying issue of diversity that is key to resolution of this situation?

7. What would be a positive outcome where the diversity issue could be leveraged as a business opportunity?

Studies in Diversity – "R-E-S-P-E-C-T..."

Problem:

Strategies:

Skills Needed:

Recommended Procedural Changes:

Appendix

Studies in Diversity --"Reach Out and Touch, Somebody's Hand..."

Problem: Difficulty in compatibly working across generations (Generation X and a Baby Boomer)

Strategies:

Tony:

1) Establish a mentoring/coaching relationship with Susan.
2) Begin to learn the values of Susan and begin a solid business relationship with what they have in common.
3) Confront any personal fears associated with Gen X reps.

Susan:

1) Take responsibility rather than "flight".
2) Be proactive in soliciting Tony's assistance.
3) Express to the cluster her feelings, emotions, expectations, and assumptions. Get feedback and support.

Skills Needed:

Tony:

1) Diversity skills in relationship, communication, and generational differences.

Susan:

1) Basic interpersonal skills: relationship, communication, and conflict resolution. Also, Innovation's "100% personal responsibility" cognitive skill.

Recommended Procedural Changes:

1) Short-term team project between Tony and Susan.
2) Create a new "sales approach" based upon their generational differences.

Studies in Diversity – "We Are Familee"

Problem: Personal/Family responsibilities interfering with effective teaming.

Strategies:

Alfonso:

1) Organize a meeting with Linda and Gary and communicate his concerns about meeting attendance.
2) Ensure their commitment to meeting dates and contingency plans with the exception of emergencies.
3) Discuss and resolve the question of "team commitment" and what it means and requires.

Linda and Gary:

1) Communicate what they are each willing to do to ensure attendance at cluster meetings.
2) Discuss and resolve with Alfonso the questions of "team commitment" and what it means and requires of them.

Skills Needed:

Alfonso, Linda, and Gary:

1) Interpersonal diversity-related skills in relationship, communication, and problem awareness and resolution.
2) Cognitive skills: Holding others proactively accountable.
3) Balancing teaming with individual performance in sales.

Recommended Procedural Changes:

1) Establish specific team-related goals/objectives in their working relationships and sales goals and *measure* their success.
2) Use technology for greater communication.

Studies in Diversity – "I Can Make It On My Own..."

Problem: Conflict resulting from a lack of cross-functional cooperation within a cluster.

Strategies:

1) Establish *who*, *what*, and *when* when making sales support agreements.
2) Establish an accountability process *during* physician visitations.
3) Get clear, initially, about everyone's *commitment* about sales support.
4) Let everyone know of difficulties in meeting commitments and be personally responsible for a solution.

Skills Needed:

1) Interpersonal skills of communication, relationship, and proactive accountability.
2) Teaming experiences (seminars/workshops) to learn the value of teaming support in terms of everyone's overall success.

Recommended Procedural Changes:

1) Discuss the upsides and downsides of cross-functional cooperation.
2) Establish a committed agreement of how it will function.
3) Debrief the synergism that results from implementing the above strategies.

Studies in Diversity – "I'll Get By As Long As I Have You..."

Problem: Cross-functional issue of creating a compatible team between married and single representatives.

Strategies:

1) Sheila needs to make clear her expectations of all team members for success.
2) Sheila needs to create greater sense of teamwork among all team members.
3) Family team members need to share their efforts at balancing personal/work life.
4) Family team members need to commit to performance expectations and know the rewards that will be forthcoming.
5) Annette needs to realize that ultimately team cooperation will sustain everyone in the long run.

Skills Needed:

1) Seminar/workshop simulation exercise in cross-functional teaming.
2) Learning to work compatibly between single and married sales representatives.

Recommended Procedural Changes:

1) Teaming opportunity between Annette and a team member with a family.
2) Sheila being a mentor/coach for a team member with a family where success of the team member is synonymous with Sheila's success.

Studies in Diversity – "R-E-S-P-E-C-T..."

Problem: Profit versus Merck's core diversity values – which prevails?

Strategies:

1) Merck makes clear its policy of respecting and valuing diversity where customers and employees are concerned.
2) Dr. Hines respecting and adhering to Merck's policies when/if attending events.
3) Dr. Hines choosing the best way to be advised of medical updates of Merck products.
4) Weave into HEL events a diversity icebreaker, fun exercise, or illustrate that the origin of many drugs are based upon historical usage by indigenous cultures.
5) Other, by the group (Merck clusters know best).

Skills Needed:

1) Learn to facilitate HEL events in addition to information education.
2) Key HEL elements – experiential, transformational, and entertaining.
3) Proactive accountability where core diversity values are key.
4) Total ownership by the cluster of anything that is associated with an HEL event.

Recommended Procedural Changes:

1) Weave Merck values into HEL presentations.
2) Clarify all possible value issues around profitability – establish guidelines.
3) Be certain the cluster operates as a unified team.